| | Task | Start | Finish | Status | Risks/Issues |
|---|------|-------|--------|--------|--------------|
| 1 | Pension System Resumption (PSR) Project | 02/09/05 | 11/30/09 | 1. The PSR Team finalized the data reporting requirements for over 2,400 Employers on August 12. In order to minimize the impact to their legacy systems created by PSR, Employers will have the option of submitting their data to CalPERS via either online or batch methods.<br><br>2. CalPERS information security policy requires a security agreement for each exchange of information with an external partner. Since PSR involves multiple data exchanges with each of our 2800+ employers and other external business partners, under the existing process, the Team would be required to collect thousands of agreements. In an effort to mitigate the workload impact on both CalPERS and our external partners, the PSR Team worked with the Information Security Office, the Privacy and Security Task Force and the Information Technology Services Branch to streamline the process to accept a single agreement from each partner.<br><br>3. In order to address the requirements of CalPERS "expanded" services (e.g., Alternate Retirement Plan, Supplemental Income Programs), the PSR team is conducting a gap analysis to determine how much of the new functionality in already included in the General Design. It is anticipated that any scope increase resulting from the inclusion of these programs will be addressed via mid-year adjustment.<br><br>4. Detailed Design for the integration of PSR with the CalPERS Financial Services solution is on schedule to complete in late November. Throughout July and August, design sessions were held to document the requirements for the handling of receivables, payments, billing, reconciliation, and other financial services features; the resulting General System Requirements Specifications | 1. The potential impact of the Financial Services Integration requirements on the PSR Schedule may be significant; the impact will be defined during the Detailed Design effort currently in progress.<br><br>2. Employers and Business Partners may not be able to meet PSR's planned testing schedule; responses are expected from Employers and Business Partners in September. |

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| | | | | deliverable was reviewed and approved in August. In order to maintain schedule commitments for starting the Build Phase in December, the Team will prepare cost estimates for presentation in October.<br><br>5. During the Annual Ice Cream Social held on August 20th, PSR conducted demonstrations of the new PSR system in Room 1600 for nearly 200 CalPERS staff. | |

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| 2 | Enterprise Transition Management (ETM) Project | 7/30/2007 | 7/30/2010 | 1. The ETM Team worked with the Business Owners' Committee to revise the scope of work necessary for program area staff to support and ensure a successful transition to the new PSR solution; the revised scope was approved by the Steering Committee on August 13.  The revised scope, including the activities identified for the ITSB transition effort, was approved by the Project Executives on August 20.   Subsequently, the ETM Team developed the detailed work plan, staffing plan and project budget to support the new scope.<br><br>2. Recruitment for a replacement Project Manager is underway.  It is anticipated the position will be filled by early October.<br><br>3. The ITSB employee skills inventory, which establishes a baseline measure of existing skills and assists with the identification of overall training needs, was completed August 13. The survey was completed by 394 ITSB staff members, an 84% completion rate. The results are being analyzed and the transition team is developing a plan to ensure training needs are adequately addressed. | |

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| 3 | Public Employer Readiness Team (PERT) | 03/01/08 | 11/30/09 | 1. Data reporting requirements were delivered to over 2,400 Employers on August 14.<br><br>2. A PERT webpage, dedicated to providing Employers with essential readiness information, was rolled out on the CalPERS On-Line website on August 13. The webpage contains technical documentation, project information, and frequently asked questions and answers (FAQs) that will assist Employers to become ready to adopt the PSR solution. In addition, the webpage facilitates the collection of important data and feedback from Employers required by PSR and PERT to support the transition to the PSR Solution.<br><br>3. The PERT team kicked-off Phase One Employer education on August 15 with the release of the *Decision-Maker's Guide To Employer Reporting Requirements* to Employers who directly report enrollment and/or payroll information to CalPERS. PERT is asking Employers to select the reporting methods they will use with the PSR solution by October 15.<br><br>4. Phase One Employer education will be primarily delivered via 44 web conferences. The web conferences have been structured and scheduled to accommodate specific Employer groups (e.g., schools or Employers who report only health benefits); they will continue through mid-October. The first web conference, focused on optional methods for reporting data, was conducted on August 26.<br><br>5. Administrative options for Employers who may face hardships in meeting the PSR solution's data reporting requirements have been identified. These options will be presented to CalPERS Executive staff in September. | 1. Some Employers may not be ready with the new PSR format for enrollment and contribution data. |